

To: Greaves, Holly[greaves.holly@epa.gov]; Dennis, Norwood[Dennis.Norwood@epa.gov]
From: Que Jones I[qxjones@gmail.com]
Sent: Tue 12/18/2018 11:50:04 PM (UTC)
Subject: EEO number 2
[EEOperformance2.docx](#)

Mr. Dennis,

As promised, here is the supporting documentation for the second EEO filed against the CFO, Holly Greaves on December 9th that will also be used for the mediation.

I will also be adding my attorney to the meeting as well.



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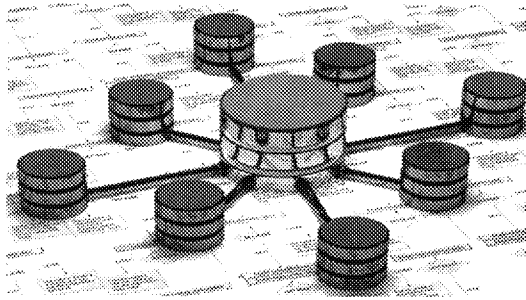
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Data Warehousing Support at EPA

KeyLogic helped develop a business reporting environment with dozens of ways for the EPA Office of the Chief Information Officer to filter information and generate reports—quickly and accurately.

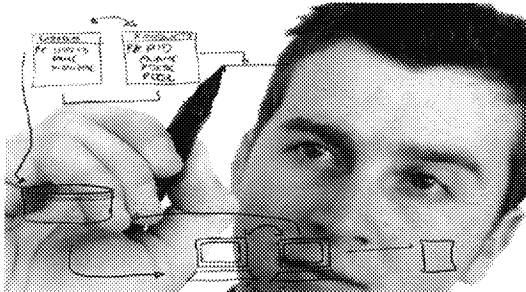
KeyLogic Brings IT Consulting and Database Architecture Experience

The Client: The U.S. Environmental Protection Agency's (EPA) Office of the Chief Financial Officer (OCFC) manages the agency's annual budget process and oversees financial operations. Its work enables the EPA's core mission of protecting health and the environment.



The Challenge: The OCFC's Office of Technology Solutions (OTS) had several database systems feeding multiple data repositories used for enterprise reporting. Ensuring quick, accurate data retrieval and consolidation of important budget and financial data across the agency was challenging.

The Solution: Partnering with a large IT provider, KeyLogic was part of OCFC's application integration team. It served two roles — consultant and database architect. As a consultant, KeyLogic evaluated OCFC IT projects, conducted research to gather important information about the as-is state, and recommended to-be solutions conforming to industry-recognized best practices. As a database architect, KeyLogic designed and built a multi-dimensional central data repository for budget and financial information. The OCFC now has a better structured data source, and its reporting tools more efficiently capture agency budget and spending over a wide spectrum of categories.



Quick List of KeyLogic Experience

CFO Datawarehousing

Related Contract Vehicles

GSA IT Schedule 70

EPA HHS656

Testimonials

"Just want you to know how lucky we are to have you on our team. We definitely could not do this mail without you!"

EPA Customer

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Contact KeyLogic

888.204.9649

contact@keylogic.com



Attachments:



**US General Services Administration
Federal Acquisition Service
Contracting Division
Sources Sought Notice
On Behalf of the Environmental Protection Agency (EPA)**

Date: November 13, 2018

Source Sought Notice

Contracting Office: U.S. General Services Administration (GSA)
Federal Acquisition Service (FAS)
Contracting Division (9QZAA)
Pacific Rim Region (R9)

From: Fred Herson, Contracting Officer, GSA, Federal Acquisition Service

To: GSA Multiple Award Schedule 70 Information Technology (IT)

Project Title: Environmental Protection Agency (EPA), Office of Chief Financial Officer (OCFO) – Custom Computer Programming

NOTICE:

This Sources Sought Notice is being issued solely for information and planning purposes. It **does not** constitute a Request for Quote (RFQ) or a promise to issue an RFQ in the future. This Sources Sought Notice does not commit the Government to a contract for any supply or service whatsoever. Furthermore, the Government is not at this time seeking quotations and will not accept unsolicited quotations. Responders are advised that the Government will not reimburse for any information or administrative costs incurred in response to this Sources Sought Notice; all costs associated with responding to this Sources Sought Notice will be solely at the interested parties' expense. Not responding to this Sources Sought Notice does not preclude participation in a future RFQ, if one is issued.

MARKET RESEARCH:

This Sources Sought Notice is seeking responses from businesses that can provide the required service under the MAS IT Schedule 70. The data obtained from this Sources Sought Notice will assist the Government in understanding the capabilities available in the industry marketplace and to inform the development of a way-ahead for GSA to obtain support services on behalf of the OCFO within the EPA. Additionally, the market research will assist the Government in determining which acquisition strategy can be used to best meet the requirements. GSA intends on determining the availability within GSA MAS IT Schedule 70.

Sources Sought EPA
Information Technology (IT) – Custom Computer Programming Services

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GSA is seeking industry feedback on the attached draft PWS and draft Bid Schedule.

CONTRACTUAL HISTORY

Current contract info:

Contract Number: GS-35F-0151L
GSA Order Number: 47QFPA18F0009
Type of Award: Exception to Fair Opportunity
Awardee: Key Logic Systems, Inc.
Dollar Value: Currently \$3.1 million
Contract Vehicle Used: GSA Schedule 70
Contract Type: Time and Materials (T&M)
Period of Performance: 01/15/2018 – 03/14/2019

Previous Contract Informations:

EPA provided the following contractual history:
Existing effort:
Contract: GS-35F-0151L
Issued by: EPA
Issued to: KeyLogic Systems, Inc
EPA Budget Automation System
Period of Performance: 07/15/2012 to 01/14/2018
Award: \$17,107,695.01
EPA has extended the period of performance by maximum amount of 6 months to end on 1/14/2018.
FAR 52.216-1 This is a fixed rate

SCOPE OF WORK (For full specification see the draft Performance Work Statement (PWS):
Please note that there are several optional line items that may or may not be exercised over the course of the contract based upon up to four other Agencies agreeing to utilize the contract for financial system IT support (see the draft PWS).

EPA is requesting assistance to provide improved management and access of its records and data by supporting EPA's Office of the Chief Financial Officer (OCFO), Office of Budget (OB) in the modification and maintenance of the Agency's budget systems. The budget systems are used as a centralized information technology tool during EPA's budget planning, formulation, and execution processes. The system links budget and performance data in support of EPA's efforts to comply with the requirements of the Government Performance and Results Act (GPRA). EPA's budget personnel also use the data to generate EPA's budget submission to the Office of Management and Budget (OMB) and Congress, prepare operating plans, and monitor budget execution.

The technical requirements for this task order are described in Section 3.0 TECHNICAL REQUIREMENTS of the draft PWS. The work is primarily Information Technology (IT).

Sources Sought EPA
Information Technology (IT) – Custom Computer Programming Services

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Budget Formulatio

PERFORMANCE WORK STATEMENT (PWS)

ID09180115 – Information Technology (IT) – Custom Computer Programming Services

- Ensure aging tickets are actively worked on;
- Identify tickets when the issue is deemed as a defect or change request and properly notify user; and
- Coordinate activities between COR, ACOR, OB, and external help desks.

3.3.3.3 Optional Documentation Support

The contractor shall develop complete documentation on systems developed or modified. This documentation will consist of a Technical Manual detailing the technical aspects of the system for use by future programmers in maintaining, upgrading and modifying the system and Standard Operating Procedures (SOPs) In addition, the system's program code shall be fully documented and provided to the EPA COR, ACOR, and CO electronically. The contractor will develop System Lifecycle support documents. To provide assistance to users, the contractor shall develop and maintain User's Manuals and on-line help. The User's Manual shall completely address each aspect of the system functions from the users' perspective. It will be developed using a step-by-step instruction approach designed to support both new and experienced system users. Agile methodologies used to support the project shall be developed and kept up to date at all times. The Contractor shall attend meetings, develop meeting minutes, create documents that outline issues or recommendations, prepares Standard Operating Procedures (SOPs) related to the project.

3.3.3.4 Optional – New Data Warehouses or Data Marts

The contractor shall support the development of data warehouses or data marts to support budget, finance, performance, and other administrative reporting needs. Warehouses and marts may be relational or multi-dimensional databases. Data warehousing support includes the process of populating data warehouses or marts with data from other administrative systems using extract/transform/load (ETL) tools. The contractor shall also assist in creating/maintaining reporting environments related to the data warehouses and marts.

3.3.3.5 Optional Training Support

The contractor shall train agency employees on systems that are developed or modified. The contractor shall develop training courses and materials as well as provide instructors. While the contractor shall present information concerning the subject matter, all interpretation of policies, guidance, or other materials will be directed to EPA representatives.

In developing a training course, the contractor shall provide materials that document the information being conveyed in succinct, concise form, including references to the location of additional, detailed information. Where appropriate, the contractor shall conduct hands-on sessions designed to have participants conduct exercises. This will improve understanding and shorten the learning curve. The contractor shall provide a "Train the Trainer Manual" that includes the answers to the exercises in order to permit participants to train additional personnel themselves.

Budget Formulation CPIC

Initiative Definition BY20

Initiative Definition BY20

Template Name BY2020

Is this investment a consolidated business case? No

Consolidated Business Case Parent Investment(s)

Investment Name BFS - Budget Formulation System

Investment Revision Number 32

Point of Contact Chin, Derek

Revision Comment

Class IT

Descriptive Information BY20

UPI Information BY20

Agency Environmental Protection Agency

Bureau Office Of The Chief Financial Officer

EPA Investment Category/Type Medium

Change in Investment Status Identifier No Change in Status

Agency description of change in investment status

Name of this Investment BFS - Budget Formulation System

Full UPI/UII Code 020-000010070 00-00-02-16-02-00

Unique Investment Identifier 9 Digit Code 000010070

Shared Services Category 00

Shared Services Identifier

Mission Support Investment Category Other

Part of Agency IT Portfolio Summary IT Investments for Mission Support Systems

Standard IT Infrastructure and Management Category Not Applicable

OMB Major Mission Area Multi-Goal IT Investments

OMB Investment Type 02 - Non-Major IT Investment

National Security Systems Identifier Non-National Security System Investment

Previous (UII) (12 digits required for all legacy investments) 020-000010070 00-00-01-01-02-00

OMB Short Description Budget Formulation System (BFS) formerly titled New Budget Formulation System (NBFS) will be EPA's future budgeting system . Budget Automation System (formerly titled Budget Formulation System) is EPA's current budgeting system. Development began in 2014.

EPA IT Project Code BD

In which year did or will this investment begin? (Specify year - e.g., 2013)? 2014

In which year will this investment reach the end of its estimated useful life? (specify year - e.g., 2021) 2030

Alignment to IT/IM Strategic Plan Initiatives:

The IT/IM Strategic Plan is an EPA-wide strategy that focuses on the strategic enterprise-wide needs that align with the administrator's priorities. The CIO SAC defined seven IT/IM Initiatives to help advance the strategy and drive change towards achieving the IT/IM Goal Statement. The CIO SAC is working to align Federal Information Technology Acquisition Reform Act (FITARA) and Capital Planning and Investment Control (CPIC) reviews with the Initiatives.

Initiative Priority	IT IM Strategic Initiatives
1 (required)	2. Modernize EPA'S IT/IM infrastructure, applications and services
2 (optional)	
3 (optional)	

Provide the initiatives, goals or milestones that this investment plans to achieve in BY20.

The goal of the investment in BY20 is to provide performance data for the Performance Dashboard.

Additional IT Portfolio Questions BY20

Data Center ID Table: The unique identifier (or list of the identifiers) from your agency's data center inventory, which is submitted to OMB on a quarterly basis in conjunction with the Integrated Data Collection (IDC).

Data Center ID

Data Center ID	Description
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Functional/Business Sponsor Name David Bloom

Functional/Business Sponsor Title Deputy CFO

Functional/Business Sponsor Phone Number 2025641151

Functional/Business Sponsor Phone Number Extension

Functional/Business Sponsor Email bloom.david@epa.gov

BRM Mappings BY20

Primary BRM Mapping (FEA BRM v3.1) 101-Budget Formulation

Secondary BRM Mapping #1 (FEA BRM v3.1) 104-Strategic Planning

Secondary BRM Mapping #2 (FEA BRM v3.1)

Secondary BRM Mapping #3 (FEA BRM v3.1)

Secondary BRM Mapping #4 (FEA BRM v3.1)

Financial BY20

Life Cycle Costs BY20

Provide the total estimated life cycle cost for this Investment by completing the following table. All totals represent all IT resources and budgetary sources of funding, consistent with the Agency IT Portfolio Summary. Totals are to be reported in millions of dollars. Variations from planned expenditures will be reflected in the Project Activities Table and the Agile Activities Table in the Major IT Business Case Detail. Federal personnel costs should be included only in the rows designated as "... Govt. FTE costs" and should be excluded from other costs.

Message

From: Que Jones I [qxjones@gmail.com]
Sent: 2/4/2019 12:29:25 AM
To: Greaves, Holly [greaves.holly@epa.gov]
Subject: Travel voucher & overpayment

Holly,

I wanted to follow up on my previous email to you about my travel voucher. I received the payment for this voucher on Friday 2/1.

However, in addition to this payment, I received an additional payment in my checking account. I was confused and surprised by the deposit. On Monday January 28th, while talking about my separation date with Randy Farrell, stated, **“I delayed payroll for the entire agency to make sure you did not get paid inadvertently!”** This comment was both random and unsolicited. Since the payment ID indicates federal salary, I would have to guess that this **is** some type salary payment. I looked at my account in Employee express and I didn't see any record of an additional payment.

Based on the salary ID, the fact that there is not anything in employee express, and assuming that Randy did what he said and **“delayed payroll for the agency to make sure that I didn't get paid”**, my **guess** is that this was some type of special pay adjustment for the week of December 30th – January 5th. If this is correct, I was not an EPA employee that week and should not have received this special pay adjustment. Since I only have the deposit amount and nothing in Employee Express, I cannot provide the exact reason for the deposit and I can only calculate the net amount of the transaction. As a result, someone will have to review the transaction and determine if this is an overpayment or an appropriate payment for some other reason. If this is an overpayment, you will need to have someone issue me an out-of-service debt once the final calculation has been completed.

I just wanted to immediately bring this to your attention to so that you can have someone determine if this was an isolated incident or if this has happened to others that are similarly situated.

Thanks

qxj

+ 02/01/19	☑ COM2 TREAS 310 : FED SAL ID: 9101036009CO: COM2 TREAS 310	\$1,695.00
+ 02/01/19	☑ EPA TREAS 310 : MISC PAY ID: 9101036151CO: EPA TREAS 310	\$569.04